

Heritage Behavioral Health Center, Inc.

JOB DESCRIPTION/PEFORMANCE EVALUATION FORM

I. General

Employee Name: _____ Title: Primary/Behavioral Health Care Integration Health and Wellness Coach Position # _____

Performance Evaluation Time Frame: _____ Leader Name: _____

Length of time supervised by this Leader _____

Qualifications: The minimum requirements for education and/or related experience for this position are as follows: *bachelor's degree in exercise physiology or a social science field. Must demonstrate interest and or experience in exercise, coaching, dance and nutrition, and be willing to work with clients to assist them in achieving holistic health and wellness.* We expect all staff to have a strong desire to provide excellent customer service; to comply with the rules and regulations of those organizations to which we are accountable; to have high ethical and professional standards of conduct; must possess the flexibility to work with "high risk" clients with complicated problems, and to have an attitude of wanting to continuously improve their own performance as well as that of Heritage. He/she must possess the ability to utilize necessary computer hardware and software. A valid Illinois driver's license, reliable means of transportation, and evidence of insurability are also required.

Physical Requirements: Must have the ability to lift 15 pounds on a regular basis. Must have mobility sufficient to transport and support customers during the provision of outreach services on a regular basis.

Summary of Responsibilities: In keeping with the Mission, Vision, and Corporate Values of Heritage Behavioral Health Center, the Health and Wellness Coach is responsible for developing a wellness program which is aligned with the SAMHSA's National Consensus Statement on Mental Health . This individual must develop individualized wellness plans and work with clients on an individual as well as group basis with primary focus on coaching them to improve health and wellness. These activities will include exercise and fitness, nutrition, smoking cessation, stress management, weight management etc.) Demonstrates the ability to review and document client progress and adjust interventions, level of care, and/or array of services to better meet treatment goals/wellness plans, based on consultation with the clients, significant others and/or additional service providers. This program will include client self-direction, person center approaches, client empowerment, and holistic care. The person must fully buy into the concept that recovery is possible. Demonstrates the ability to provide care management services/referral, linkage, and advocacy in the home, community and provider sites as needed. Demonstrates the ability to review and document client progress and adjust interventions, level of care, and/or array of services to better meet treatment goals, based on consultation, with the client, significant others and /or additional service providers. Individual demonstrates ability to modify approaches by taking into consideration such characteristics as disability, gender, sexual orientation, development level, ethnicity, age, spirituality and health status. As part of Heritage's team-oriented philosophy, the PBHCI Wellness Coach, is expected to actively participate in a variety of cross-functional teams and performance improvement initiatives.

Reports to: Project Director Primary/Behavioral Health Care Initiative Project Director

Accountable to: Chief Clinical Officer

Supervises Employees: No

Risk Category:

2 Moderate

Training and Other Requirements **Add Job Specific trainings	Check if Mandated for this Job	Date Successfully Completed	Completed within required timeframe	Comments
NCI	X			
CPR	X			
Orientation	X			
Corporate Compliance/Ethics	X			
Confidentiality	X			
First Aid	X			
Infection Control	X			
RSA	N/A			
Treatment Planning/Documentation	X			
Sexual Harassment for Employees	X			
Violence in the Workplace	X			
OSHA Bloodborne Pathogens	X			
3 Q&A's	X			

II. Job Description and Performance Evaluation Criteria.

This document is both a description of responsibilities as well as the criteria to be used in evaluating the employee's performance. For each key responsibility associated with the above job title, the supervisor will evaluate the employee's performance according to the following rating scale:

- 1 = Exceeds Standard Almost always exceeds the expectations of this responsibility/competence with minimal supervision.
- 2 = Meets Standard Meets the expectations for this responsibility/competence without much additional supervision.
- 3 = Does not meet Standard Often does not meet the expectations for this responsibility/competence in spite of supervisory activity above what would normally be expected for satisfactory performance.
- NA= Not applicable

All 1's require explanation in the comment section for each Corporate Value. All 3's must be addressed in the Plan for Improvement section.

III. Job Description, Performance Evaluation Criteria and Performance Improvement Plan

<p>CORPORATE VALUE</p> <p>Specific Job Responsibilities/tasks</p>	<p>Method of Verification CH = Chart review/documentation S = Supervision O = Observation CS = Customer Satisfaction (direct feedback and/or surveys) P = Peer review (direct feedback, UM reports)</p>					<p>Rating Score</p>	<p>Comments/Plan for Improvement Identify corrective actions and/or training that will be implemented to address all responsibilities scored a 3. Indicate the specific objectives and timeframes. All 1's require an explanation in the comment section. *Other Positive comments are also encouraged.</p>
<p>1. Offers outstanding customer service that is timely, sensitive and respectful.</p>	CH	S	O	CS	P		
<p>A. Helps to create an environment that communicates to customers that they deserve the best service possible.</p>							
<p>1. Displays pleasant and courteous interactions with customers (e.g., smiles and makes eye contact, help people who look confused or lost, introduce self and calls other by name, lets consumers and visitors go first on elevators, considerate of others feelings and concerns, etc.).</p>							
<p>2. Uses language and behavior that consistently reflects and enhances the dignity of individuals with emotional disorders, mental illnesses, and addictive disorders.</p>							
<p>B. Provides a timely and helpful response to any customer requesting assistance.</p>							

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<p>1. Offers outstanding customer service that is timely, sensitive and respectful.</p>	CH	S	O	CS	P		
<p>C. Adjusts work priorities as needed to meet unforeseen demands.</p>							
<p>D. Demonstrates an ability to effectively use organizational communication devices (e.g., telephones, pagers, and facsimile) and software required to perform job duties (e.g., Lotus Notes, Clinician's Desktop)</p>							
<p>1. Is able to input data and/or use devices/software appropriately, efficiently, accurately and timely as required by the necessary task.</p>							
<p>E. Assumes other duties and responsibilities as assigned.</p>							

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<p>2. Continuously improves the quality and value of our services.</p>	CH	S	O	CS	P		
<p>. A. Demonstrates the ability to manage and treat chronic health care from a holistic and long-term perspective versus episodic acute care for medical problems. Keeps clients on track with their healthcare plan.</p>							
<p>B. Adapts the recovery model and believes that all clients have the capacity to learn, change, and grow.</p>							
<p>1. Will engage clients in managing their health condition by utilizing coaching techniques and encouragement.</p>							
<p>2. Encourages clients to participate in a full range of person-centered healthcare, and plans ongoing groups that support behavioral and primary services..</p>							
<p>3. Develops individualized wellness plans and works with clients on an individual as well as group basis with primary focus on coaching them to improve health and wellness</p>							
<p>4. Coordinates individual and group wellness activities a minimum of 3 times per week using the Lilly Curriculum for Team Solutions and Wellness, In Shape; exercise, cooking/nutrition, smoking cessation, and any other nationally recognized wellness curriculum.</p>							
<p>5. Will educate Heritage nurses and case managers on wellness related activities.</p>							

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<p>2. Continuously improves the quality and value of our services.</p>	CH	S	O	CS	P		
<p>B. Links clients to existing services, benefits counseling, and wellness activities to include, but not limited to nutrition counseling, health education, peer specialists, self-management, smoking cessation, weight management, and physical exercise</p>							
<p>C. Notifies appropriate staff if there is a problem (e.g., if client is not showing up for Primary Care visits, obtaining laboratory tests, or adhering to health and wellness treatment plans.</p>							
<p>C. Must maintain productivity standards as identified for this project.</p>							
<p>E. Demonstrates the ability to review and document client progress and adjust interventions, level of care, and/or array of services to better meet treatment goals, based on consultation with the client, significant others and/or additional service providers.</p>							
<p>F. Must be able to work in a variety of settings, on and off-site, in the client's home and / or community.</p>							
<p>G. Demonstrates the ability to review and document all necessary paper work as required by the state and regulatory bodies. This includes logs, progress notes, and incident reports.</p>							
<p>H. Is knowledgeable about SAMHSA's required registry tracking/outcome measurements, and tracks and records data in correct format</p>							

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<p>2. Continuously improves the quality and value of our services.</p>	CH	S	O	CS	P		
<p>1. Presents relevant information on specific cases to Primary Care Physician/Nurse Practitioner, PBHCI RN, psychiatrist, or other Heritage team members.</p>							
<p>2. Communication with clients reflects varied techniques and: allows extra time for processing questions or information.</p>							
<p>3. Modifies materials to aid client's understanding; acquires additional information from others; obtain resources from others (i.e., interpreters, other subject matter experts, etc.).</p>							
<p>F. Demonstrates the ability to help the client identify, select, and practice strategies allowing the client to develop the knowledge, skills and/or attitudes required for successful health and wellness.</p>							
<p>1. Demonstrates ability to improve client's understanding of materials, groups and discussions by taking into consideration such characteristics such as disability, gender, sexual orientation, developmental level, ethnicity, age, spirituality and health status.</p>							

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<p>2. Continuously improves the quality and value of our services.</p>	CH	S	O	CS	P		
<p>G. Makes referrals for psychiatric and medical services as appropriate and provides advocacy, transportation, and support as needed.</p>							
<p>H. Monitors client response to medication and consult with appropriate nurse and/or physician as indicated.</p>							
<p>I. Demonstrates an recognize crisis situations, including danger to self and others, and takes appropriate action to obtain assistance.</p>							

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<p>2. Continuously improves the quality and value of our services.</p>	CH	S	O	CS	P		
<p>J. Attends and participates in appropriate or required staff meetings, whether program, organization-wide, or ad hoc.</p>							
<p>K. Works enthusiastically and cooperatively within a team-based framework.</p>							
<p>L. Takes initiative to prevent and resolve problems and offers recommendations for improving services.</p>							
<p>M. Organizes time, effort, and use of resources to achieve desired outcomes.</p>							

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<p>2. Continuously improves the quality and value of our services.</p>	CH	S	O	CS	P		
<p>N. Obtains knowledge and skills leading to improved performance in assigned responsibilities.</p>							
<p>O. Works in partnership with customers in all aspects of service planning, treatment, and support activities.</p>							
<p>P. Recognizes the unique needs of individuals with emotional disorders, mental illness, and/or addictive disorders and co-occurring disorders (e.g., developmental disabilities, physical disabilities, personality disorders, trauma, brain injury, etc).</p>							
<p>Q. Encourages and facilitates personal growth and development toward recovery and wellness.</p>							

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<p>2. Continuously improves the quality and value of our services.</p>	CH	S	O	CS	P		
<p>R. Obtains and maintains credentials and competencies appropriate to assigned responsibilities and job classification.</p>							
<p>S. Actively participates in cross-functional teams.</p>							
<p>T. Integrates community resources, for any and all life domain area(s) identified as deficient, into the treatment planning and service delivery process.</p>							
<p>U. Presents relevant information for the purpose of assuring quality of care, gaining feedback, and planning changes in the course of treatment.</p>							

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<p>3. Provides services at the highest levels of ethical conduct and accountability.</p>	CH	S	O	CS	P		
<p>A. Completes all required documentation legibly, accurately, thoroughly, and within the prescribed time frames.</p>							
<p>B. Demonstrates knowledge of and complies with the rules and regulations of the funders, regulatory agencies and accrediting bodies to which Heritage is accountable, as it applies to the responsibilities of his/her position.</p>							
<p>C. Reports any suspected violations of these rules and regulations as well as any actions that are believed to be unethical, illegal or that represents professional misconduct.</p>							
<p>D. Maintains confidentiality of consumers as well as any and all information considered sensitive to Heritage operations.</p>							

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<p>3. Provides services at the highest levels of ethical conduct and accountability.</p>	CH	S	O	CS	P		
<p>E. Follows Heritage Policies, Procedures and Code of Ethics.</p>							
<p>F. Follows Employee Policy and Procedure for management of sick, personal, vacation, conference leave, and/or any other leave.</p>							
<p>1. Non FLMA related sick leave use during this evaluation period _____hours.</p>							

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<p>4. Actively promotes behavioral health wellness and understanding in our community.</p>	CH	S	O	CS	P		
<p>A. Educates community members on issues of mental health, mental illness, and substance use, and wellness activities as well as the availability of prevention and treatment resources.</p>							
<p>B. Participates in community and/or Heritage events related to above.</p>							
<p>C. Represents Heritage in the community in a way, which is consistent with its mission and values.</p>							

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<p>5. Enhances the understanding of, and respect for, the diverse cultures with which we interact.</p>	CH	S	O	CS	P		
<p>A. Demonstrates basic knowledge, understanding and values of cultural, racial, and gender differences, and other issues related to emotional disorders, mental illness, and addictive disorders and associated treatment.</p>							
<p>B. Treat all customers with dignity and respect, regardless of race, ethnicity, nationality, religion, sexual orientation, or gender.</p>							
<p>1. Shows consideration for others, works cooperatively with any coworker; provides constructive feedback without undue criticism of others; displays appreciation of differences in approaches, personalities, and viewpoints of others.</p>							
<p>C. Actively participates in programming where appropriate, that celebrates the heritage, beliefs and customs of the various cultural groups whom we serve.</p>							

- ☐ Competent, exceeds standard, able to assess competency of others.
- ☐ Competent to function within current job description.
- ☐ Is Developing Competency, plan for continued improvement is outlined above.
- ☐ Not competent to demonstrate necessary skills. Performance Contract Attached

I, the undersigned, have read the above job description and performance criteria. I understand how I will be evaluated and that, in order for me to continue my employment as a Community Support Specialist, I must receive, at a minimum, a satisfactory evaluation.

_____ Employee	_____ Date
_____ Supervisor	_____ Date
_____ Chief Officer	_____ Date

I, the undersigned, have reviewed this evaluation with my supervisor for the period _____. I agree to complete all identified areas for improving my performance within the designated timeframes.

_____ Employee	_____ Date
_____ Supervisor	_____ Date
_____ Chief Officer	_____ Date

If you do not agree with this evaluation, or some portion of it, please state your reason(s) on the back page. To the Supervisor and Employee: Please note any changes to the responsibilities and/or competencies you believe are necessary to make this Job Description/Performance Criteria more current. Make the changes on the back of this page or in the body of the evaluation so it is clear what you are requesting to be changed.